



CAO
CHIEF ADMINISTRATIVE OFFICER

Facilitator Guide

Memo Writing Workshop



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Course Information

Course Description

This 45-minute workshop gives participants access to memo writing tools, tips, and techniques, including a live practice session.

Room Set-Up

Participants will attend in person or via Webinar. The classroom will be arranged with maximum distance to meet current health regulations. Remote participants will join at the scheduled time of the session and participate live via WebEx Meeting.

Duration of Course

Memo Writing Workshop is designed to take 45 minutes to complete.

Target Audience

Member office staff who currently or will one day write memos for Members, Directors, Chiefs, or other decision-making staff.

Class Size

The number of in-person participants will be limited by classroom size. Unlimited online participants may join.

Course Objectives

Given the successful completion of this course, participants will be able to:

1. Understand how and why memos are used in Member Offices
2. Review and analyze example memo formats
3. Learn and practice how to structure information in a memo

Instructional Approach

This course will be designed as a discussion-based, hands-on session for an in-person audience/live webinar. Instruction will involve:

- Poll questions and open-ended questions
- Individual brainstorming
- Categorization and grouping of ideas
- Practice

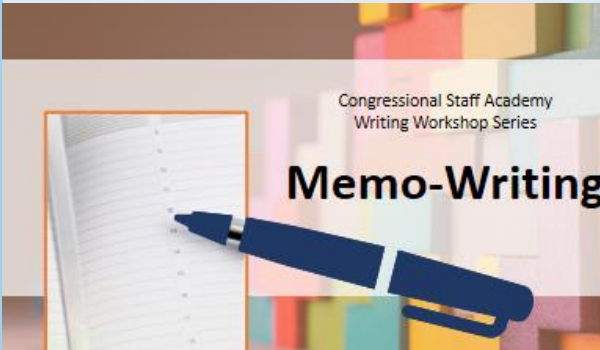
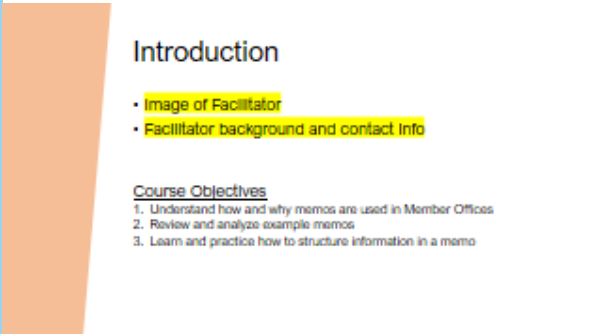


Course Agenda

Section	Section Duration	Topic	Description	Topic Duration
1	9:00	Welcome	Tech Overview, Facilitator Introduction, and Course Overview	2:00
		Warm-Up	<i>Activity: Poll</i>	1:00
		Intro to Memos	Types and uses	6:00
2	12:00	Dos of Memo Writing	Recommendations from experienced House staff	6:00
		Practice Concise Writing	<i>Activity: Get to the Point</i>	3:00
		Don'ts of Memo Writing	Common pitfalls	3:00
3	11:00	Structure of a Memo	Component parts explained	9:00
		Knowledge Check	<i>Activity: What's missing?</i>	2:00
4	13:00	Final Activity	<i>Activity: Complete a Memo</i>	10:00
		Course Conclusion	Wrap-up, review objectives, Q&A	3:00
Total	45:00			45:00



Course Facilitation

Section 1 Duration 9:00	<ul style="list-style-type: none"> • Welcome • Warm-Up • Intro to Memos
Slide Image / Directions	Notes / Script
<p>Slide 1 – Title Duration 1:00</p> 	<p>Notes: Allow participants an opportunity to find their seats. Follow Health Guidelines for COVID.</p> <p>Check that technology is working. This is a hybrid workshop.</p>
<p>Slide 2 – Introduction Duration 1:00</p> 	<p>Action: Advance slide.</p> <p>Notes: Use body language and breathing to have a strong voice and encouraging presence.</p> <p>Script: Welcome to Congressional Staff Academy’s Memo Writing Workshop. I’m [NAME] and I’ll be facilitating our session today.</p> <p>Notes: What about your background lends you expertise?</p> <p>Script: By the end of this workshop, you will:</p> <ol style="list-style-type: none"> 1. Understand how and why memos are used in Member Offices 2. Review and analyze example memos 3. Learn and practice how to structure information in a memo
<p>Slide 3 – Agenda</p>	<p>Action: Advance slide.</p>

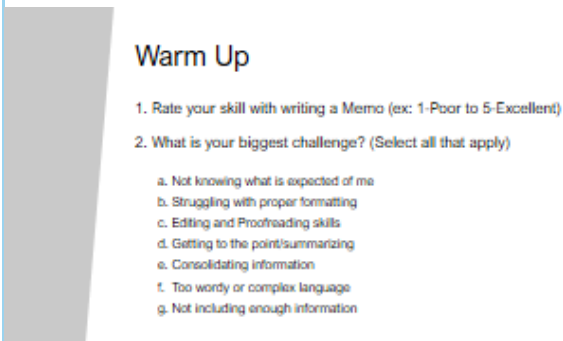
Duration 1:00

Notes: As you walk through the agenda, set the tone for the course with enthusiasm.

Script: Our agenda today includes:

- An Introduction to Memos
 - What are they, how do we use them, why are they important?
- Dos and Don'ts of Memo Writing
 - Includes recommendations from experienced House staff
 - How to write concisely
- Structure of a Memo
 - Write memos that look, and *are* easy to read
 - We'll look at example House memos
- Final Activity and Conclusion

This course moves really quickly so please write down and hold on to your questions until Q&A at the end.

Slide 4 – Warm-Up**Duration 2:00**

Action: Advance slide.

Script: Let's start with a quick warm-up. Online participants can select responses in the poll that we'll post now.

1. Rate your skill with writing a Memo (ex: 1-Poor to 5-Excellent)
2. What is your biggest challenge? (Select all that apply)
 - a. Not knowing what is expected of me
 - b. Struggling with proper formatting
 - c. Editing and Proofreading skills
 - d. Getting to the point/summarizing
 - e. Consolidating information
 - f. Too wordy or complex language
 - g. Not including enough information

While we wait for responses to come in, I'm looking for someone to volunteer.

Action: Ask, "How do you use memos in your office?" Check for volunteers to share. Explain your own experience if time allows.

Action: Read the poll results. Point out the popular responses and any trends you see.

Slide 5 – Why Use Memos?**Duration 1:00**

Action: Advance slide.

Script: Members and other leaders do not have time in the workday to read every inter-office communication and proposed legislation. They

Why Use Memos?

- Leaders must regularly **make decisions** based on more information than they can digest.

cannot follow every change in the political landscape through media. They cannot personally hear responses from each of their constituents.

A Member Office, and other offices at the House, have too large a scope of responsibility for any one person to be up to date on all that's going on.

However, Members and other leaders find themselves responsible for knowing it all anyway! They must regularly **make decisions** based on this wealth of knowledge, and their success depends on doing this well.

Notes: Expand on areas in which your unique background and experience provides insight.

Slide 6 – What is a Memo?

Duration 1:00

What is a Memo?

Memos:

1. Cover only one topic
2. Give an assessment of facts and summary of opinions
3. Follow an organized and recognizable structure
4. Are written in concise language
5. Give context to put the decision into perspective
6. Provide actionable guidance to the member or leader
7. Offer a clear recommendation

Ask yourself: How do these details fit into the big picture?

Action: Advance slide.

Script: One solution to this problem is writing memos! Memos are very brief, informative, written communications that aid in decision-making. Memos:

1. Cover only one topic
2. Give a holistic assessment of facts and summary of opinions
3. Follow an organized and recognizable structure that makes it easy to read
4. Are written in concise language that removes unnecessary words
5. Give context to put the decision into perspective
6. Provide actionable guidance to the member or leader, including the risks of action and non-action
7. Offer one's own thoughts along with a clear recommendation

So, to write a good memo is to consider quite a lot! Don't worry, we'll cover all of these throughout the workshop.

Members and other leaders want to know the important details and see how those details fit into the big picture. Depending on what type of memo you are writing, you should include different details.

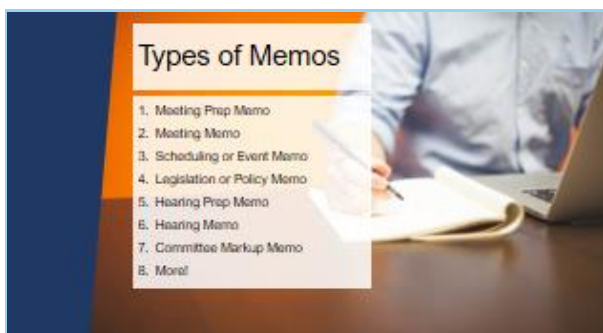
Slide 7 – Types of Memos

Duration 2:00

Action: Advance slide.

Script: We've asked around the House to understand which situations justify writing a memo, and what types of memos House Offices regularly use. Here are some common memo types.

1. Meeting Prep Memo



- a. A memo that prepares a Member or other leader for a meeting they will attend
 - b. Includes the logistics, agenda, context of the meeting, and what your office is looking to get out of it, attendees and their relationship to office, prior interactions with staff/member, or suggested questions or points of discussion
2. Meeting Memo
 - a. An account of a meeting that happened
 - b. Includes attendees, topics covered, takeaways/lessons learned, action items
3. Scheduling or Event Memo
 - a. A description of an event or trip and related activities
 - b. Includes an itinerary, schedule, important attendees, associated costs, and the pros and cons of attending
4. Legislation or Policy Memo
 - a. A recommendation to support or not support some new policy or legislation
 - b. Includes a summary of the change and the political gains or fallout associated with supporting or not supporting
5. Hearing Prep Memo
 - a. A memo that prepares a Member for a hearing they will attend
 - b. Includes talking points to support their position, the strengths and weaknesses of that position, expected outcomes
6. Hearing Memo
 - a. An account of a member's participation in a hearing
 - b. Includes media response, feedback, and general outcome
7. Committee Markup Memo
 - a. An account of a committee markup
 - b. Includes the result of any votes and amendments

Memos can help prepare for a townhall or provide talking points for a speaking engagement. You will find memos are effective in Member Offices, District Offices, Committees, and anywhere leaders in the House make decisions.

It's important to note that the format and use of memos vary significantly between offices. Ultimately, a memo is a tool to help your boss; So be sure to prioritize their needs.

Slide 8 – Intro Recap

Duration 1:00

Action: Advance slide.

Script: So far, we've learned several reasons memos are critical to an Office. They:

Intro Recap

Memos:

- Can be used to recommend decisions, actions, and new legislation
- Document events such as constituent and stakeholder meetings for reference
- Get your leader and office on the same page



Does your office use memos in other ways?

- Can be used to recommend decisions, actions, and new legislation
- Document events such as constituent and stakeholder meetings for future reference
- Get your leader and office on the same page

Action: Check for volunteers to add to this list. Ask, “Does your office use memos in other ways?”

Script: Now we’ll move on to talk about the right and wrong ways to draft an effective memo.

Section 2

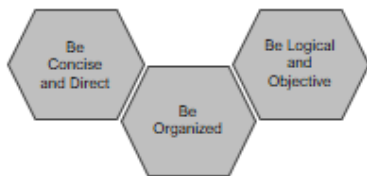
Duration 12:00

- Dos and Don’ts of Memo Writing
- Practice Concise Writing

Slide 9 – The Dos

Duration 3:00

The Dos



"VIGOROUS WRITING IS CONCISE."
WILLIAM STRUNK, JR.

Action: Advance slide.

Script: Just because memos are short doesn’t mean they are easy to write. In fact, the opposite is true. “Vigorous writing is concise.”

What this essentially means, is that it’s difficult to fit a lot of details into very few words. And yet, we’ve already covered how *important* it is to include those details.

To help you with this challenging task, we’ve compiled a list of memo-writing tips and techniques.

Do the following:

- Be concise and direct
 - Your memo should take under one minute to read. You want it to be consumable “at a glance”.
 - Only include information that is:
 - Directly relevant to the topic
 - Helpful to your Member or leader
 - Apply concise writing techniques to choose the best words and remove the rest
 - We’ll cover these techniques later
- Be organized
 - Use a template or standardized format
 - Why re-invent the wheel? Create or use a template and get a head start every time you write a memo.
 - Use bullets
 - Use bullets for every list of items or steps
 - Proofread
 - Writing is notoriously difficult to do without error. There are editors in every writing industry.

- Find an editor in your office or be your own!
 - Try stepping away from your writing for an hour and then proofread it with fresh eyes
- Spelling and grammar errors cause confusion and can make the author seem untrustworthy, (What else did they get wrong?)
- Structure the document
 - Structure is the way we order and categorize information on the page
 - We'll cover this in detail later
- Be logical and objective
 - Use imperative language
 - A cooking recipe is a good example of this type of language
 - Create a sequence of statements to determine how to reach a goal
 - Provide both sides of an argument
 - You'll most commonly see this done as a pros and cons list
 - Pros and cons lists are very popular and very helpful logic tools
 - Useful when you have to choose between "A" and "B"
- When creating written arguments:
 - Lay out each premise clearly
 - Provide evidence for each premise
 - Draw a clear connection to the conclusion

Slide 10 – The Dos (Continued)

Duration 3:00

The Dos



Action: Advance slide.

- Be helpful
 - Use absolutely clear language
 - Avoid pronouns altogether and be *very* specific about who and which things you reference
 - Use names and labels that are familiar to your Member or leader
- Offer talking points
 - If your Member will speak at the related meeting, hearing, townhall, or other event, prepare talking points that are relevant to the audience and goal for him or her attending
- Cite the opinions of important others
 - If someone's opinion is of importance to your Member or leader, consider including it
 - In some examples, we've seen that the author gets signatures from their LA, LD, *and* Chief on the memo to verify office buy-in

- Include sources and points of contact
 - Who did you contact to validate the information?
 - Is that someone your leader knows? You may want to specify who they work for or other details.
 - Which other sources are informing your recommendation?
 - Don't cite sensational media
 - Use sources that your boss trusts
- Follow Directions
 - If you are given specific instructions for writing memos, follow them
- Be analytical
 - Include data
 - Budget-related issues require financial analysis
 - Calculate percentages and other meaningful data
 - Predict outcomes
 - What can your leader expect out of an event or vote or decision?
 - Prediction is hard. Those who can do the work and see a few steps ahead are incredibly valuable to any leader.
 - Consider risk
 - Controversial issues require analysis of political fall-out or buy-in
 - What's the worst-case scenario if you're wrong?
- Be constituent-focused
 - Provide a tieback to the constituents or office when appropriate
 - How does this decision affect "my" people?
 - When offering talking points, write with a local touch

So, that's our list of dos. Let's take a moment to think about them.

Action: Ask the class, *"Did anyone see something here that they find particularly interesting or surprising?"* Explain your own thoughts if time allows.

Slide 11 – Activity: Get to the Point

Duration 5:00

Action: Advance slide.

Script: The following activity will allow us to practice writing concisely.

Directions: Review and rewrite the following wordy statements provided. You can write in bullets or in short sentences. I'll give you a few minutes. Follow these tips:

Activity: Get to the Point

Directions: Review and rewrite the following wordy statements provided in bullets or in short sentences.

- 1) The Committee did finally get back to us and fortunately they are in favor of the initiative.
- 2) Not only do the local and national groups want to support the bill, but they would also like to know how to they are able to help, and specifically would like to know of any suggestions you may have.
- 3) In one such example, 1200 employees that are stationed in Rhode Island are absolutely vital to ensuring that the equipment and facilities used in rescues are properly maintained and working as expected. Should their numbers be reduced, there could be a significant effect on the response time in attempts to rescue fisherman at sea who are in trouble.

1. The Committee did finally get back to us and fortunately they are in favor of the initiative.
2. Not only do the local and national groups want to support the bill, but they would also like to know how to they are able to help, and specifically would like to know of any suggestions you may have.
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- Use the best words
 - Strong vocabulary provides deeper meaning in fewer words
- Be direct and specific
 - Try sticking to one idea per sentence
 - Avoid pronouns
- Use clear language
 - Simplify and shorten ideas
 - Avoid passive voice

Break: Take three minutes to let the class complete the activity.

Action: Ask, “Would anyone like to share their shortened versions of these statements?” Check for volunteers. You may also ask:

- Did anyone manage to shorten this example to five words?
- Did anyone find this more difficult than you expected?

Action: If time allows, read following example answers.

1. The Committee replied in favor.
2. Many groups support the bill and now want suggestions on how to help.
3. If you lay off these maintenance and workers, it will take longer to rescue fishermen in danger.

Script: At the end of this training, we’ll provide links to resources where you can learn more about concise writing. You will find this is a very valuable skill for work at the House.

Slide 12 – The Don’ts

Duration 4:00

The Don'ts

Action: Advance slide.

Script: Let’s move on to our Don’ts.

Don’t do the following:

- Don’t write walls of text
 - It’s much more difficult to read “walls” of text than it is well-spaced-out information
 - Break up paragraphs of over three sentences
 - If you are writing concisely, each idea should be clear and its own separate sentence
 - Don’t use memos when the topic warrants a lengthier explanation
 - If you can’t shorten or remove the text to less than one minute reading time, consider another medium, such as a report
- Don’t lose focus

- Combine different topics in one memo
 - Sometimes a subtopic or background deserves its own memo
- Don't include information that is important to you, personally. Keep your Member or leader in mind as this memo is a tool for *them*.
- Don't fail to prepare
 - This is likely the worst mistake you can make
 - When you author a memo, you are taking responsibility for the information included
 - Don't force yourself into a decision. If you are unable to make a conclusion or decision yourself, say so. Then, include the pros and cons and relevant data.
 - Don't forget to include relevant stakeholders
 - It's your job to seek out potential allies and contributors before moving forward without them
- Don't speak for others
 - Don't fabricate buy-in or assume the thoughts of others
 - If this is an important decision, consider double-checking with very important people
- Don't write memos on unimportant topics
 - Memos are formal documents for important decisions and events
 - Do not use this medium for informal or everyday decisions

If you can simply avoid some of these common pitfalls, you'll greatly improve your writing.

Action: Ask the class, "*Would anyone like to add to this list? Does your member or leader have any preferences for how you communicate with them?*" Explain your own thoughts if time allows.

Script: Now let's take a look at some real memo examples.

Slide 13/14 – Activity: Analyze Example Memo

Duration 5:00

Action: Advance slide.

Script: Here is an example memo used at the House that was kindly provided to us. Some information has been removed.

Directions: Review and identify dos and don'ts present in that memo. I'll give you a couple of minutes.

Action: Advance slide.

Break: Take two minutes to let the class review the memos.

Activity: Analyze Example Memo

Directions: Review the following memo and identify dos and don'ts.

Cosponsor: H.R. 2487, Jumpstart Our Business by Supporting Students (JOBS) Act of 2019
Sponsor: Representative
Cosponsor(s): 43

Problem: Employers throughout America are finding it increasingly difficult to fill open positions. A recent small business survey found that 51% of business owners reported few or no qualified applicants for their openings. Currently, needs-based Federal Pell Grants are only available to students who enroll in a program of study that requires at least 600 clock hours of instruction over 15 weeks.

Solution: Providing further access to CTE and short-term education programs can help bridge the skills gap by helping individuals receive the training and instruction necessary for job development.

Legislation: H.R. 2487 provides a fix to bridge America's skills gap by extending Pell Grant eligibility to qualified programs that are between 150 and 600 clock hours and at least eight weeks in length. The bill amends the Higher Education Act by adding in two additional categories that would qualify for Pell Grants: "eligible career pathway program" and "eligible job training program".

NOTE: This bill is similar to your bill, PROPEL Act. They are similar in regard to allowing short-term Pell Grant opportunities, in reducing the number of clock hours and weeks required. However, your PROPEL act does not require the training lead to a recognized educational credential and the JOBS Act requires a credential must be the result.

YES ☒ NO ☐ HOLD ☐ More Information ☐

Action: Ask, “Did anyone identify a do or don’t in these memos?” Check for volunteers.

Action: If time allows, follow the scripts below to describe some yourself.

- Do – Draw connections. The NOTE section reminds the Member that this bill is similar to another bill they support.
- Don’t – Be repetitive. “Bridging a skill gap” is mentioned twice. Remove superfluous language.

Script: This example does a good job of fitting a lot of information into one page because it is written concisely and is well-structured.

Section 3

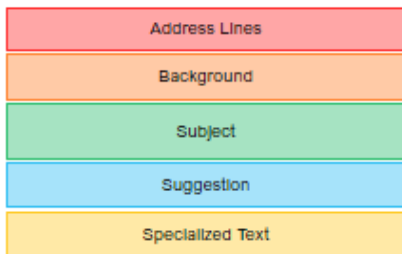
Duration 11:00

- Structure of a Memo
- Knowledge Check

Slide 15 – Structure

Duration 9:00

Structure



Action: Advance slide.

Script: It’s important to structure your memos strategically and consistently so they are quickly and easily understood. Each Member, Chief and other leader has their own preference for what they want to see. This could include everything down to font size.

Outside of those preferences, you may want to include the following sections when structuring your document.

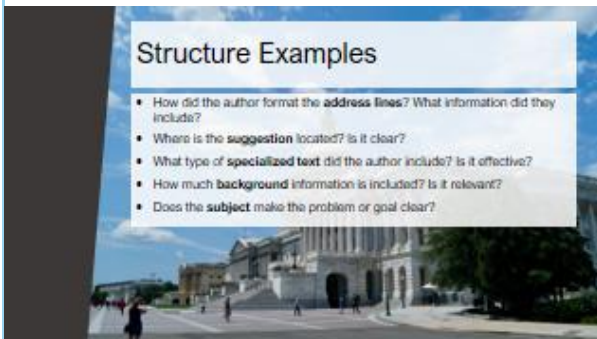
- Address Lines
 - These are the “to/from/date/RE:” fields of a memo or email
 - If a Member has five memos on her desk, she’ll look at the Subject Line and Sender to decide which to read first
 - This information is also prioritized in Microsoft Office products
 - Clear and straightforward subject lines make it easier to file the memo
 - Just as a memo is a condensed version of some information, you must condense the purpose of the memo into one subject line

- Use the concise writing techniques you just learned!
 - Ask your Member how they'd like to be addressed. We've seen that some go by their initials in these documents.
- Subject
 - Start with the main subject or take-away when possible. You need to get to the point!
- Background
 - Provide the context you feel your boss needs to know. Examples include:
 - Deadlines
 - Growing interest on an issue
 - Constituent immediate need
- Specialized Text
 - What type of memo is this? We covered which specific information you should include earlier in the training.
- Suggestion
 - Make clear what courses of action are available to the member/leader
 - "Game" out the risks and outcomes of each
 - Get buy-in via signatures or recommendations

If you can follow this structure and manage to exclude anything else, you'll have written an effective memo.

Slide 16/17 – Structure Examples

Duration 2:00



Action: Advance slide.

Script: Take a look at the next slide to see a memo with the structure labeled.

Action: Advance slide.

Consider some of the following:

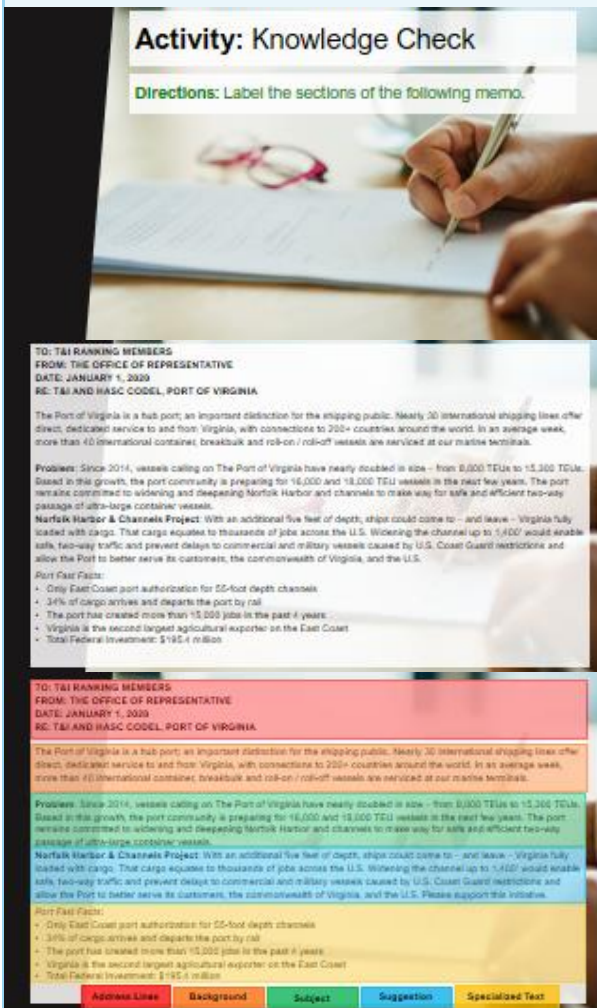
- How did the author format the **address lines**? What information did they include?
- Where is the **suggestion** located? Is it clear?
- What type of **specialized text** did the author include? Is it effective?
- How much **background** information is included? Is it relevant?
- Does the **subject** make the problem or goal clear?

Action: Ask, *"Would anyone like to answer one of these questions?"* Check for volunteers. If time allows, provide an answer to one of the questions yourself.



Slide 18/19/20 – Activity: Knowledge Check

Duration 1:00



Action: Advance slide.

Directions: Go ahead and label the sections of the following memo.

Break: Take one minute to let the class complete the activity.

Action: Advance slide.

Action: Ask, “was everyone able to identify the sections?” Entertain any comments or questions.

Action: Advance slide.

Script: Here you can see we’ve labeled the structure of this memo.

Action: If time allows, point out any sections that weren’t covered by the participants.

Now that we’ve covered Dos, Don’ts, and structure, I think we are ready for the final activity.

Section 4

Duration 13:00

- Final Activity
- Course Conclusion

Slide 21/22 – Activity: Final Activity

Duration 10:00



Action: Advance slide.

Script: For the final activity, we'll write our own memos.

Directions: From the information provided, and using tips and techniques covered throughout this training, write an effective memo. I'll give you several minutes and am here for questions.

Action: Advance slide.

Break: Take two minutes to let the class familiarize themselves with the activity. Monitor chat and in-person questions.

Script: Here is a tip; Start by structuring your memo. Sort information into each section. Then, clean up each section.

Break: Take six minutes to let the class complete the activity. Monitor chat and in-person questions.

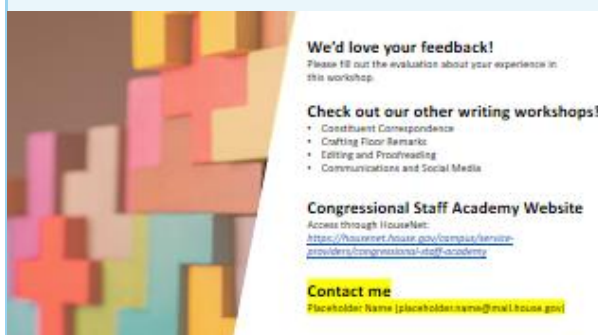
Script: Hopefully you all had enough time to write a memo you are happy with.

Action: Debrief with the following questions:

- What was the most important content you felt needed to be included in your memo?
- What was your biggest challenge in completing this activity?

Slide 23 - Closing Slide

Duration 3:00



Script: That wraps things up for our *Memo Writing Workshop*, thank you so much for attending! We hope you now know:

- How and why memos are used in Member Offices
- What you should include in a memo
- How to structure an effective memo

Script: Additional training opportunities relating to memo writing are provided in links in the participant workbook.

- [Using Logic in Writing](#) Purdue OWL
- [Concision](#) Purdue OWL
- LinkedIn Learning keyword "Concise Writing"
 - There are many writing courses available
 - [Business Writing](#)
 - [Considerations for Memos](#)

The last page of the participant workbook is a one-page guide that condenses the content covered in this course. Use this tool to create your effective memos!

Good luck and thank you so much for attending!

Notes: Well done, facilitator! You can provide feedback to this guide directly to the Congressional Staff Academy.

Script: We are now open for Q&A!

Action: Answer any questions the class may as time allows